UXPin

Design Collaboration in the Enterprise

Mastering Remote Collaboration

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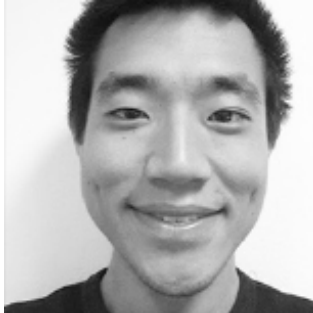
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Jerry Cao is a content strategist at UXPin where he gets to put his overly active imagination to paper every day. In a past life, he developed content strategies for clients at Brafton and worked in traditional advertising at DDB San Francisco. In his spare time he enjoys playing electric guitar, watching foreign horror films, and expanding his knowledge of random facts.
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Co-founder and head of product, Kamil previously worked as a UX/UI Designer at Grupa Nokaut. He studied software engineering in university, but design and psychology have always been his greatest passions. Follow me on Twitter @ziebak

With a passion for writing and an interest in everything anything related to design or technology, Matt Ellis found freelance writing best suited his skills and allowed him to be paid for his curiosity. Having worked with various design and tech companies in the past, he feels quite at home at UXPin as the go-to writer, researcher, and editor. When he's not writing, Matt loves to travel, another byproduct of curiosity.

Introduction

Don't let the distance between you create distance.

While rolling out of bed and right into your office in the next room has its perks, the unfortunate drawback is the loss of connectivity that more traditional office environments share. But just because you or your team members are scattered geographically, doesn't mean you can't all work together in the same space figuratively.
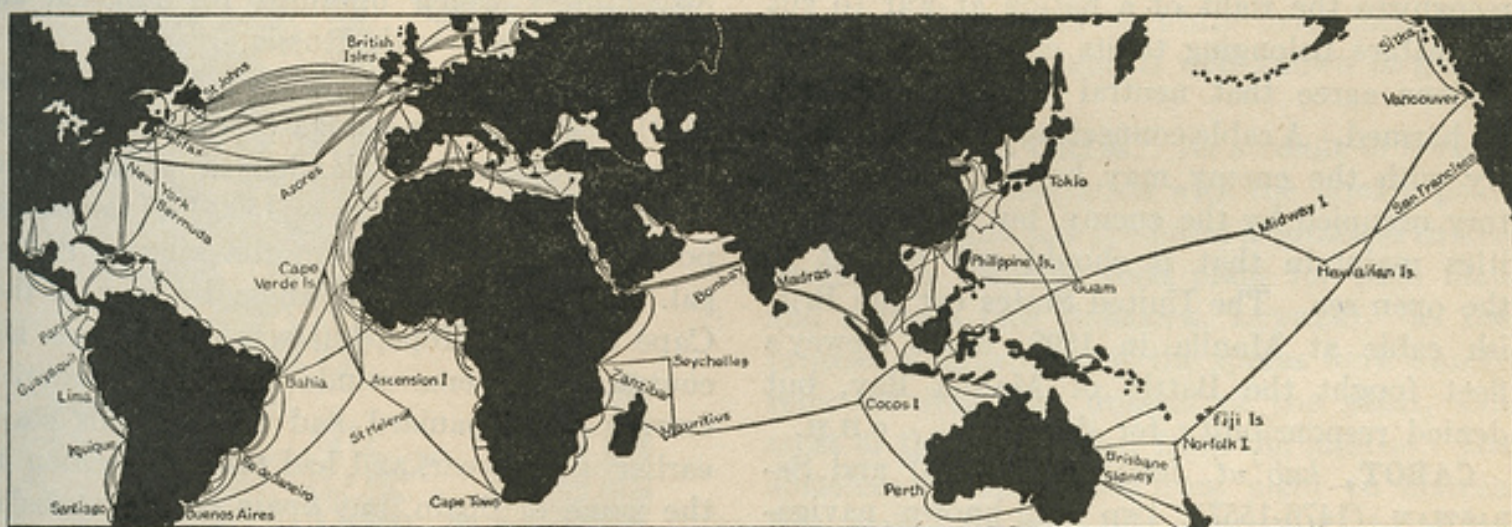
PRINCIPAL OCEAN CABLES IN 1917

Source: "Principal Ocean Cables 1917." Eric Fischer. Creative Commons.

In this book, we'll discuss how to adapt our collaboration guidelines specifically to those working remotely, first with general practices, then how to modify group activities, and last with some communication tools that can help.

If you find these ideas helpful, feel free to share with anyone else who might enjoy the book.

For the love of UX design,

Jerry Cao

co-written by Matt Ellis and Kamil Zieba

Meet in Person When Possible

It seems like odd advice to start off a chapter on collaborating remotely, but the operative words are "if possible." Whenever you can, it always helps to talk face to face about design decisions rather than screen to screen.

Source: "Vienna Service Design Jam" *Christian Lendi*. *Creative Commons*.

Of course this is not always possible, which is why we'll discuss remote communication later in the chapter. The further you move away from in-person communication – first video chat, then phone chat, then instant messaging, and lastly email – the more you might lose at each step if you aren't careful.

As Jeff Gothelf recommends, meeting in person is especially helpful at the beginning of design, when the process is more abstract with less concrete individual tasks.

At this point when brainstorming is common, being in the same room allows thoughts to flow at their own rapid-fire pace, whereas talking remotely can sometimes cause lags that may interrupt the momentum.

If the team members are in town, it's also worth conducting some initial user research. As we described in *Collaborative User Research in the Enterprise*, it's hard to substitute for the contextual insights generated by the team shortly after an on-site testing session. You can test users in a formal lab setting, or run a series of quick guerilla usability tests, or remote usability tests if time is scarce.

Plus, you'll find that a team that knows each other personally (both inside and outside of work) just has more chemistry. The relationships you build in the first week of the project will pay off exponentially, since comfort leads to honesty. Trust us on this one, you'd much rather learn in the beginning if someone disagrees with the design direction rather than halfway through the high-fidelity prototype.

However, working in person is only the ideal, and as we've mentioned is not always any available option. Luckily at UXPin, we're able to schedule quarterly visits so that our technical team in Poland can synch up with our product team in the US when planning and kicking off new features. The visits last for 2 weeks and we always front-load any workshops so there's plenty of time for customer interviews and team bonding.

Don't Shy Away From Overcommunication

Once remote team members return to their home offices, you'll have to compensate – and sometimes overcompensate. For some, this means extending outside of your comfort zone with instant messaging, emails, and comments in a design tool.

Working remotely is, unfortunately, conducive to drifting apart. It's easy to hold something back in a text conversations over chat or email – there's just too much leeway to second-guess oneself or lose the motivation to participate. This is specifically what you should avoid by overcommunicating.

Source: "Vintage Future Fantasies: Mobile communication and television." *perhapstoopink*. *Creative Commons*.

We recommend keeping in daily contact with remote employees, even if just small chat exchanges or short 1:1 video meetings. Even regularly seeing someone's face will create rapport that encourages

openness, which naturally aids collaboration. For larger meetings, we'd recommend keeping the invitees to less than 7 so that everyone gets time to participate. Depending on your team's familiarity, you could assign a discussion lead or leave it free-flowing.

This feeling of openness is especially valuable for disagreements. During in-person meetings, if two people or groups come to a disagreement, usually a dialogue continues until they resolve the problem. Remotely, however, it's just too easy to simply clam up and move on with your day – especially if their interaction with others is purely on a "need to know basis" .

Adopt the 10-Line Rule

The 10-Line Rule, as we call it, states that if an issue cannot be properly resolved in 10 lines of instant message chat, then hop on to a video chat or make a phone call.

On a daily basis, you might use instant messengers ranging from Hipchat, Google Chat, or even our in-app chat (when designing) to collaborate with the team.

Instant messagers work great for over-communication, but they do have their limits. Despite having "instant" in their name, they can at times slow down a conversation and draw out what could be solidified in minutes over video conference.
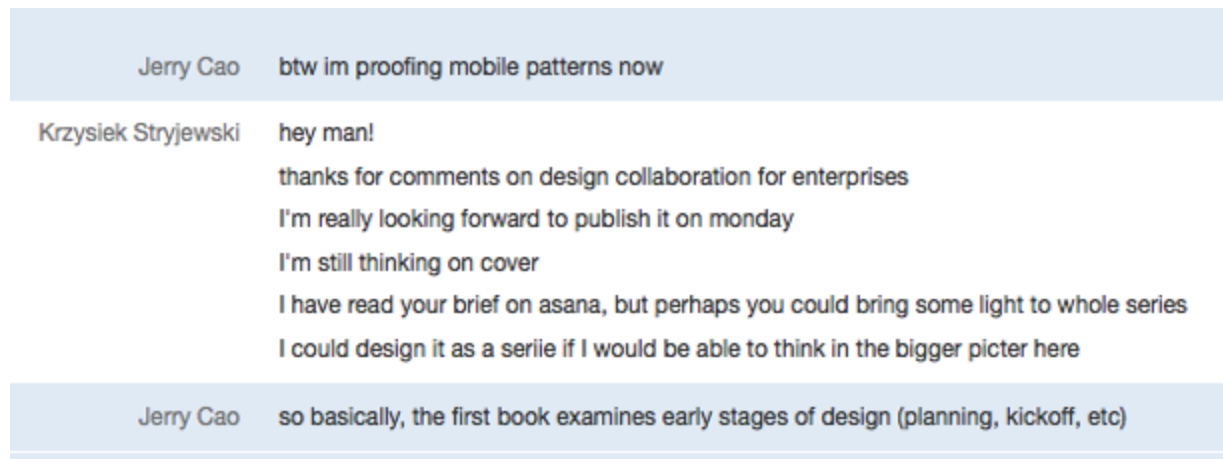
Source: UXPin via Hipchat

For general, non-priority issues, an instant messenger is a convenient and non-invasive means to encourage open communication. But for matters that hold a certain degree of weight or that require immediate attention, more direct lines of communication are better.

Source: UXPin

Maintain a Consistent Culture

Beyond just communication, make sure your remote team and on-site team share the same level of personal connection. On-site visits certainly help to accelerate the bonds, but there's also a few tricks you can use once everyone goes back.

Even though we're a startup, our efforts to create a consistent culture between our Polish and US office are adaptable to teams large or small.

If substantial work is done remotely by many designers, you could even consider using a tool like Sqwiggle which occasionally takes screenshots of coworkers that others can click to prompt conversations.
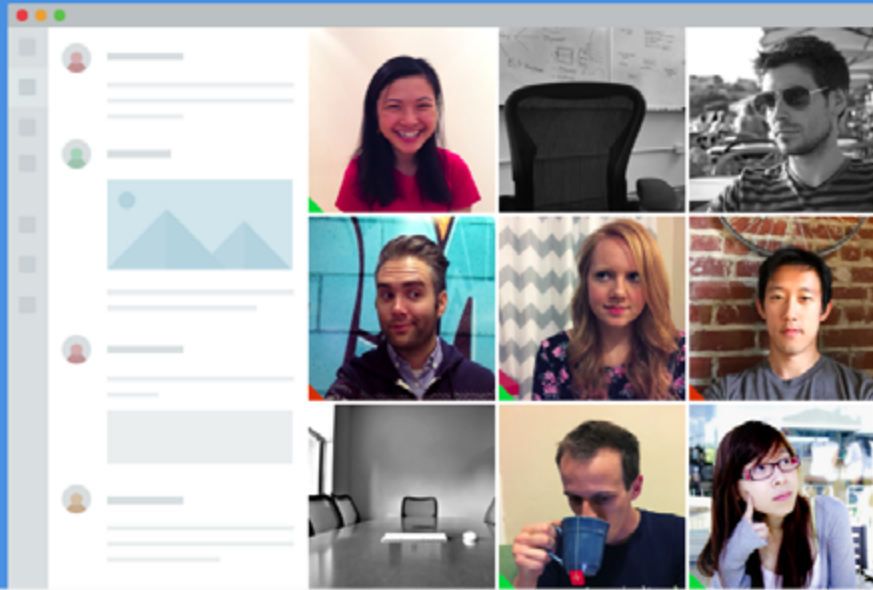
Photo credits: UXPin via Sqwiggle

Here's a few more tips that are applicable regardless of politics or bureaucracy:

1. **Virtual celebrations** – When you hit a major project or revenue milestone, schedule some time based on everyone's time zone to hang out and celebrate (over Skype, Hipchat, or our favorite Google Hangouts). Grab some drinks and discuss accomplishments and new learnings.

2. **Invest in social media** – Create a private Facebook group for the team to share inside jokes and keep a lighthearted atmosphere throughout the day. If your company has stricter security concerns, it might be worth looking into an enterprise social network like Yammer.

3. **Record important meetings for everyone** – Every quarter, we record our company-wide meeting and upload to Confluence

so that people who can't join in real-time are able to watch the discussion (and fun antics) at their leisure.

4. **Start a general chat lobby** – Regardless of what tool you use, create a room for the team so people can share ideas and joke around throughout the day. Whether it's discussing new layout ideas or interactions, or sharing dumb GIFs, every shared conversation is a shared experience.

Considering that remote design work usually consists of getting in the zone for hours at a time, don't forget to resurface occasionally – if only just to join in on the conversation. It will do wonders to prevent remote designers from feeling like "designers in exile".

Create a Knowledge Hub for Everyone

On a more practical level, it also helps to take a structured collaborative approach to sharing specialized knowledge between teams. There's ways of sharing knowledge and information beyond the basic Dropbox and Google Docs.

For example, you could create the following system:

1. **Google Drive/ Dropbox/Confluence** – Hosts business documents accessible to everyone (such as app metrics or customer support data). You could also encourage team members to contribute any notes or helpful advice on a weekly or monthly basis. If you're using Confluence, the product team can also stay updated on bug reports (provided you're using JIRA).
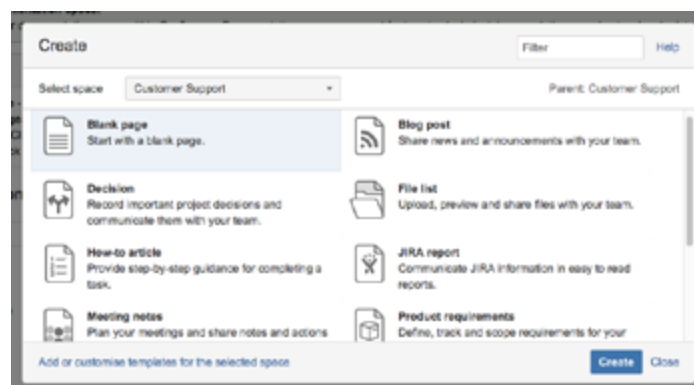

Photo credit: UXPin via Confluence

2. **UXPin** – Houses all wireframing and prototyping files, as well as any personas, user research, or any other files you'd like to upload for quick reference. Users don't even need an account to view and comment on documentation and design files.
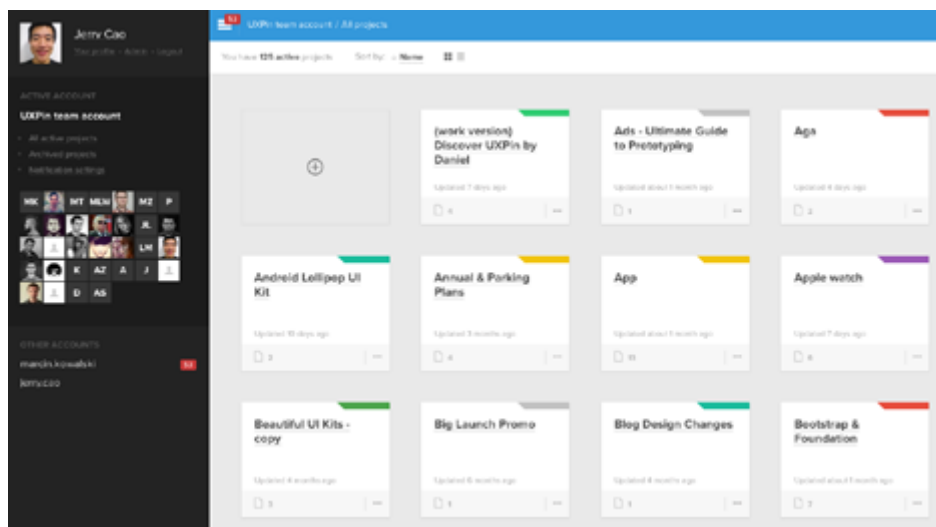
Photo credit: UXPin

3. **Asana**/**Trello** – Create and manage product roadmap and daily tasks. In our experience, we've found Asana to be very flexible for Agile methodologies considering the ease of duplicating tasks, visualizing project burn, and breaking down complex user stories into tasks.
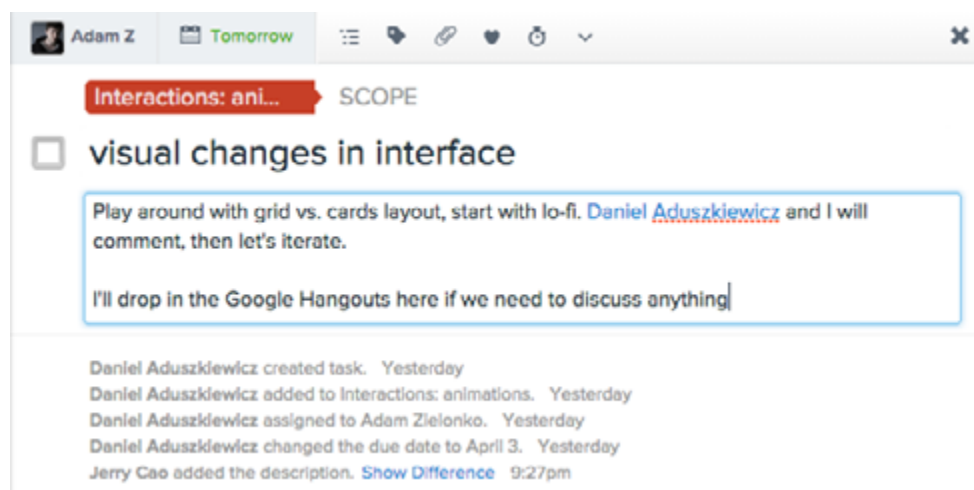

Photo credit: UXPin via Asana

For more tools to strengthen the workflow between remote and on-site teams, check out this piece from TheNextWeb featuring 20 of their favorite tools.

Remote Design Activities

One of the perceived drawbacks to having remote team-members is that you're unable to conduct such group activities like design studios or KJ feature prioritization, but the truth is that they're a lot easier to pull off than you might think.

Basically, these activities with remote members follow the same procedure we outlined in earlier chapters, except with the implementation of certain communication tools. It's which tools and how to use them that require further discussion.

1. **Design Workshops**

   The remote adaptations of the workshop below were first suggested by Jeff Gothelf, but they are simple enough to be used by any team size. In addition to wireframing and prototyping with our team in Poland, we recently tried the below exercises for brainstorming and kickoff (and they've worked out much smoother than expected so far).

   To make the most out of the exercise, try implementing the following tools (if everyone is sketching on paper):

   - **Camera** – Invest in a solid desktop document camera. In a pinch, you could also inconveniently tip your laptop webcam to focus on the sketch, but the resolution won't be as great.

- **Projector and screen** – Chances are not all of the participants will be remote, which means you'll need a method to display the remote work to those who were able to gather in person.

- **Screen-sharing software** – Your preferred method of screen-sharing (like GoToMeeting or Join.me), so that all the remote members see the same visuals as everyone else.

To pre-empt any potential technical difficulties, make sure all the tools are set up beforehand. Once everything's up and running, the workshop can be conducted much in the same way as if everyone were in the same room. Present a problem, then split people into teams (or individually) so they can start sketching ideas. Reconvene after 10 minutes, then repeat for at least 2–3 rounds until you feel that the rough ideas are starting to take shape.

Of course, you could also run the exercise with a free collaborative sketching tool like AWWApp, in which case you won't need a USB camera or projector. We've actually moved our exercises to this app because there's less paper shuffling involved. However, keep in mind that you'll likely want a stylus, and the thought of "sketching software" might intimidate non-designers.

On a side note, we sometimes also hold remote wireframing workshops (conducted collaboratively through our app) which run with wireframe proposals instead of sketches. If your product team is confident in their design skills, this exercise can provide more

polished results than a simple sketch design studio. If they aren't as comfortable creating more structured designs, then the remote sketching exercise is still an excellent fallback option.

2. **Wireframing & Prototyping**

We all know that UX design requires multiple iterations between inception and the final product. Wireframes, mockups, and functional prototypes all help you make important design decisions while being more visually impressive to stakeholders than pencil sketches.

While the mission determines the gear, all designers benefit from tools which foster collaboration. Here's a collaborative process that could help:

1. **Start on paper** – Sketch or create a paper prototype, then collect feedback from the team. Iterate the design, then run a quick usability testing session (minimum 5 users), and iterate until the rough concept is headed in the right direction. Designers using our app can then upload images of paper designs (or any other files) into their projects for reference and early feedback.

2. **Move to a digital tool** – Either start the visual design in Photoshop/Sketch, or create a new wireframe or prototype in a tool like our app. Collect feedback and iterate wireframes into prototypes by adding interactions. If the designer started in Photoshop or Sketch, they can just upload the file into our app for layered prototyping.
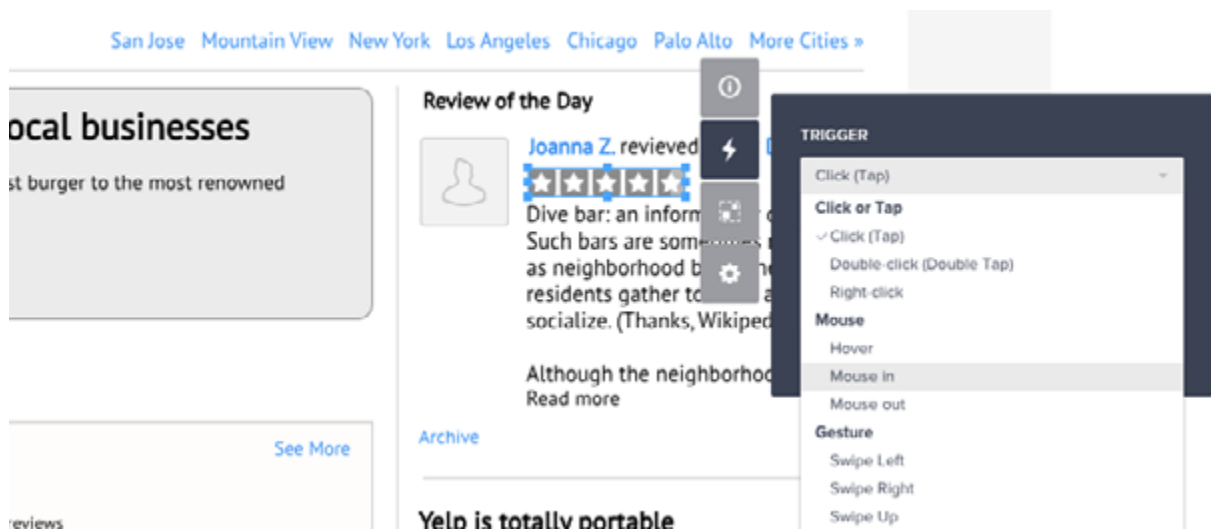
Photo credit: UXPin (inspired by Yelp)

3. **Test the digital design** – Using a tool like UserTesting, validate the design with an unlimited number of users. Some of our customers also just test their designs right in our app with our built-in moderated testing tool that records clicks, comments, and facial reactions.

4. **Iterate and present** – Since we allow anyone to comment on designs (even if they aren't UXPin users), we've seen plenty of instances where designers will get feedback from product marketers and engineers in our app. To present their work, designers can then use the Live Presentation tool.

Regardless of your design process, we've found that over-communication always helps to cement the different design stages. Using project management tools like Trello and Asana, it's much easier to manage product development without email. If the communication becomes overwhelming, you can always just delete comments and emails – it's much harder to delete design mistakes.

Recap of Remote Collaboration Tools

Remote collaboration could not be possible without collaboration tools. Below is a short list of some great tools to help you bridge the gap:

- **Dropbox** – allows for large-scale file sharing and syncing

- **Asana** – a popular project management and assignment tool

- **Trello** – an alternative card-based project management tool

- **Memo Sort** – an online brainstorming and affinity diagramming program

- **UXPin** – collaborative wireframing / prototyping (with Photoshop / Sketch integration), usability testing, and design feedback & presentation

- **AWWApp** – allows for free collaborative sketching

- **Confluence** – an all-in-one collaborative manager and file-sharing software, though only with paid subscription

- **Hipchat** – company chat / meetings software

- **Slack** – fantastic general collaboration and communication tool

- **Google Hangouts** – free teleconferencing and good tool for creating virtual connected culture

- **Sqwiggle** – video chat tool designed specifically for remote working

Different tools have different benefits, so pick the one that's best for you. Keep in mind certain pricing concerns based on location vary from tool to tool.

The business world – especially the design field – seems to be moving towards the remote workplace, especially since large companies like Automattic and Mozilla are now almost fully distributed.

While in-person communication is always the most effective, working remotely does not have to lose that personal touch. As long as we know how to make up the loss – overcommunicating and meeting face-to-face when we can – then our design will always be user-centered and people-focused.

Create collaborative wireframes & prototypes in UXPin (7–30 day free trial)
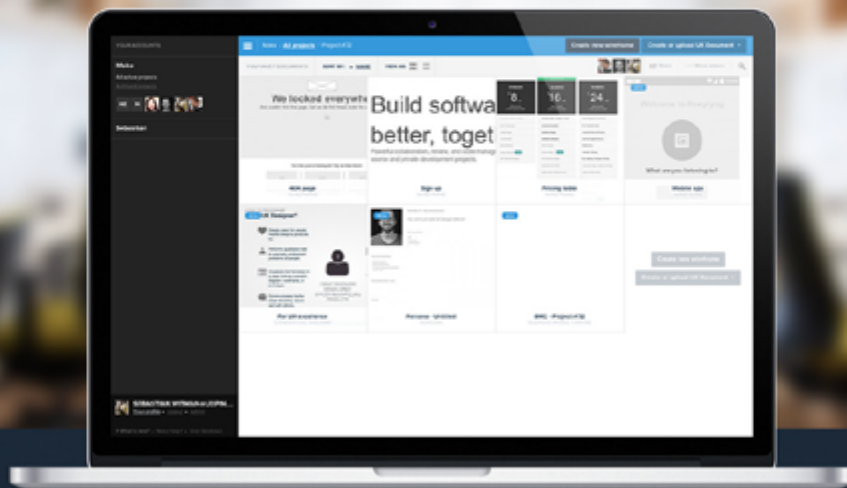
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